TeamWorks Agency Forum

June, 2014

Welcome

Facilitator: Amber Hall

Purpose

➢ Enhance communication to TeamWorks end-users

➢ Provide transparency

➢ Provide information on current and/or upcoming strategies

➢ Discuss changes and enhancements

➢ Allow Agencies to provide feedback on what is important to them

Frequency

➢ Twice a year
➢ Tentatively in October and May
➢ 2 identical meetings for convenience
➢ Will receive future invitations for upcoming Agency Forum meetings
➢ Will send the invitations about a month prior to the meetings

Presentation Tips

➢ Please type any questions you have in the Webinar question section.

➢ Questions will not be answered during the presentation. They will be compiled and sent after the 2 presentations are complete.

❖ **SAO will only answer questions for participants who provide their first name, last name, agency name, and email address**

Today's Topics

➢ **Security**

➢ **TeamWorks Financials**

➢ **TeamWorks HCM**

➢ **Customer Service Center (CSC)**

TeamWorks Security

➢ TeamWorks HCM Self-Service Account Unlock and Password Reset

- Provide the ability for **active** state employees to reset their own passwords and unlock their own accounts by successfully answering their security questions.

Presented By:

Jill Cleaveland
CIO

TeamWorks Security

➢ TeamWorks HCM Self-Service Account Unlock and Password Reset (continued)

- **Note:** Users will be unable to unlock their own accounts or reset their own passwords if any of the following applies: temporary access has expired, the employee id is terminated or inactive, the user answers the security questions incorrectly, or the access/account has been locked by a security team member.

TeamWorks Security

➢ TeamWorks HCM Self-Service Account Unlock and Password Reset (continued)
  - This new functionality is coming in late August 2014.

Presented By:
Jill Cleaveland
CIO

TeamWorks Security

➢ TeamWorks HCM Self-Service Account Unlock and Password Reset (continued)

- On the implementation date, all HCM end-users will be locked out requiring users to change their security questions/responses and to reset their password.

- Detailed instructions will be distributed to your agency HR Manager and Agency Security Officer requesting them to further distribute the instructions to your agency's HCM end-users.

TeamWorks Security

➢ TeamWorks HCM Self-Service Account Unlock and Password Reset (continued)

- **Note:** The new functionality discussed is for HCM only. For TeamWorks Financials, an end-user must continue to use the "Forgot My Password" link before locking their account. The Financials Self-Service Account Unlock and Password Reset functionality will not be implemented until later in FY15.

Questions?

Please type them in the Webinar questions section

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TeamWorks Financials

- ➤ Year End Updates
  - • Reconcile Transactions
- ➤ FY 15 Budget Trees
  - • If you are requesting a new BCM tree, be sure the BCM tree is in place before you begin loading your BP 2015 budget. Once budget loading has begun, SAO cannot move or delete values from your BCM trees.

Presented By:

Mo Moghazy

Financials Business Analyst Manager

TeamWorks Financials

➢ FY 15 AR Distribution Codes

- Beginning June 16, 2014, agencies may begin submitting new distribution codes to use for FY2015 accounts receivable (AR) transactions. If existing AR distribution codes used for FY2014 are required for FY2015, agencies may submit a request to run the distribution code copy process. The distribution code copy process will create new FY2015 distribution codes with the same chartfields as the FY2014 codes (i.e., XYZ14 will create code XYZ15).

TeamWorks Financials

- ➢ Two Accounting Periods Open
  - As two accounting periods will be opened in July, users should take extra care to validate that transactions are entered in the appropriate accounting period. The June accounting period will close on July 11, 2014 and the July accounting period will close on August 15, 2014.

Presented By:
Mo Moghazy
Financials Business Analyst Manager

TeamWorks Financials

➢ Updated FY14 Financials Close Schedule posted on SAO website

- We had a change to the schedule that the system will be unavailable beginning Friday, 7/11/2014 at 7:00 pm (after period 12 closes) thru Monday, 7/14/2014 at 7:00 am. We will use that weekend to run our monthly reconciliations to validate all transactions processed correctly.

Presented By:

Mo Moghazy

Financials Business Analyst Manager

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TeamWorks Financials

➢ FY15 Financials Close Schedule is Posted on the SAO Website

➢ http://sao.georgia.gov/sao-calendars

Presented By:

Mo Moghazy

Financials Business Analyst Manager

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TeamWorks HCM

- ➢ FY 2014 Year-end Activities
  - FY2015 Salary Increases
  - JCCP (Job Classification and Career Path)
  - FY2015 ePerformance Documents
  - GSEPS 5% Auto-enroll notification
  - ACA (Affordable Healthcare) Update

Presented By:
Martha Varn
HCM Business Analyst Manager

TeamWorks HCM

➢ FY2015 Salary Increases
- Data entry can begin after last confirmed June payroll
- Complete data entry prior to July confirmed payroll
- Do not enter any Position Data rows with effective date greater than 7/16/2014

Presented By:
Martha Varn
HCM Business Analyst Manager

TeamWorks HCM

➢ Job Classification and Career Path Project
- Salary Plan SWD only
- SWD changes will be processed on 7/10
- 7/16 Position and Job rows will be inserted with new salary grades

Presented By:

Martha Varn
HCM Business Analyst Manager

TeamWorks HCM

➢ FY2015 ePerformance Documents
➢ GSEPS 5% Auto-enroll Notification
- Record notification in TeamWorks
- Notification will be sent to ERS monthly
- Planned availability July 1

Presented By:
Martha Varn
HCM Business Analyst Manager

TeamWorks HCM

➢ Affordable Health Care Act Update
- Planned availability for reports is mid-July
- Enrollment functionality available for October Annual Enrollment

Presented By:
Martha Varn
HCM Business Analyst Manager

TeamWorks HCM

➢ Upcoming Activities
- Tax Update C
- DCH MEMS System
  - ○ Cutover to ADP scheduled for 10/1
  - ○ SAO is working with DCH to prevent any disruption to existing services for TeamWorks users

Presented By:
Martha Varn
HCM Business Analyst Manager

TeamWorks HCM

➢ Upcoming Activities (continued)
- New HCM Information Page
  o Available on SAO website
  o Application changes such as Tax Updates, customizations
  o Planned outages
  o Alerts and notices

Presented By:
Martha Varn
HCM Business Analyst Manager

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TeamWorks Customer Service Center

➢ Expect delays during YE Close - potential impacts to response times due to high call volumes

➢ Use of TW Online Training to help address common issues/questions

Presented By:

David Fields

Customer Service Center Manager

TW CSC Common Issues

➢ Financials:
- • Tree Maintenance
- • Distribution Codes
- • Fund Sources

For information related to Financials training, go to the SAO website under:
Training & Calendars > TeamWorks Training > TeamWorks Financials Online Training

http://sao.georgia.gov/teamworks-financials-online-training

Presented By:

David Fields

Customer Service Center Manager

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TW CSC Common Issues

➤ HCM:

- Job Data Change Requests

- Position Data Change Requests

- Payroll Process

For information related to HCM training, go to the SAO website under:
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http://sao.georgia.gov/teamworks-hcm-online-training

Presented By:

David Fields

Customer Service Center Manager

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TW CSC Common Issues

➤ Security:
- Password Resets
- Accounts Locked
- Security Roles Access

For information related to technology requirements and troubleshooting steps, go to the SAO website under TeamWorks > Customer Service Center > Technology Requirements > Supported Browsers:

<center>http://sao.georgia.gov/supported-browsers</center>

For information related to submitting Security Request Forms for Financials and HCM, go to the SAO website under TeamWorks > Security:

<center>http://sao.georgia.gov/security-resources</center>

Customer Service Center (CSC)

404.657.3956

888.896.7771

FSCM@sao.ga.gov

HCM@sao.ga.gov

SAO_PS_Access@sao.ga.gov

Questions?

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Presentation

➢ Presentation slides and Q&A will be posted on the SAO website

➢ Once posted, all of those who registered will receive an email with the link where the documents are located

Future Topics

➢ What would you like for us to cover?

➢ Any other suggestions or feedback?

➢ Send To: ahall@sao.ga.gov